



Centers for Disease Control and Prevention
Office of Public Health Preparedness and Response

Inventory Management Insider

From the Strategic National Stockpile

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The *Inventory Management Insider* Newsletter is produced by the CDC Division of Strategic National Stockpile and Division of Health Informatics and Surveillance. Send comments and suggestions to: ctshelp@cdc.gov.

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Greetings,

Welcome to the publication of the ***Inventory Management Insider***! This issue focuses on the upcoming changes for the next release version of the Inventory Management and Tracking System (IMATS), including changes to the IMATS landing page. Continue reading for more information about IMATS version 1.7.1, frequently asked questions, the new IMATS web page, how to add a new request in IMATS, and details on how to evaluate the application at your jurisdiction.

As always, we want to ***hear from you***. Help us learn how to improve our newsletter and provide you with needed information. Send an email to ctshelp@cdc.gov and tell us what you would like to see in the next issue of the ***Inventory Management Insider***.

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Now available! IMATS Version 1.7.1

The Countermeasure Tracking Systems (CTS) team released IMATS version 1.7.1 on April 16, 2015. The feedback we receive through ctshelp@cdc.gov from users is analyzed and considered for inclusion in each release of IMATS.

The following enhancements were incorporated in IMATS v1.7.1:

Table 1. IMATS Version 1.7.1 enhancements

Item	Details
Count Inventory Report	A new column named In Transit has been added to the Count Inventory Snapshot report. This column includes items that have been shipped and are currently in route to the customer.
Search Inventory Page	<p>The following enhancements have been made to the Search Inventory page:</p> <ul style="list-style-type: none"> • The Funding Source Type and Funding Source fields have been added, allowing users to search inventory using these criteria. • The Expiration Date Before field is a new field that allows users to search on inventory that expires (or has already expired) before a specified date. • The Include Expired Products? field provides users the option of including or excluding expired products in their search results. <p>The Export to Excel button has been renamed to Export, because the data is now exported to a .tsv file, not to a Microsoft Excel file.</p>
Automatic Refresh of User Changes	When a user's permissions or facilities access is changed, he/she automatically sees the updates. Logging out and then back in to see them is no longer necessary.
Search Purchase Orders Page	On the Search Purchase Orders page, the PO Number field now contains the Deleted option so users can search for purchase orders that have been deleted.
Import Data Page	<p>The following enhancements have been made to the Import Data page:</p> <ul style="list-style-type: none"> • When the user attempts to import a file that's formatted incorrectly, the message that displays has been changed to "The file you are attempting to import is not in the proper format. Please consult the File Format worksheet in the Import Template for the proper format". • Previously, the message read "The file you are attempting to import is not in the proper format. Please consult Section 4.3 of the System Setup & Basics document for the proper format". • A banner has been added to the top of the Import Data page to inform users that imported records are added to the database as new records; they're not merged with existing ones. • For example, if a user <i>exports</i> Facility A data, modifies it, and then imports the data back into IMATS, there will be two records for Facility A—the original record and a new one containing the updated data.

Item	Details
Export Data Page	<p>On the Export Data page, the pop-up message that displays when the user clicks the question mark icon next to the Include Header Row? field has been changed for clarification.</p> <p>The message has changed from “Include headers?” to “Include column headings in the exported file?”</p>
Funding Source Field	Throughout IMATS, the first option in the Funding Source field has been changed from “Select Funding Sources” to “Select Funding Source”.

The CTS team continues to welcome your suggestions on ways to enhance IMATS for system users.

In the works: new IMATS landing page

The CTS team is working on revamping the IMATS landing page in a future release (to be determined) to help guide users through their inventory management and tracking responsibilities. Instead of shortcuts to system functions on the landing page, a dashboard will display open items. Open items are items that need attention (put away, pick, or ship) or items for products expected to arrive at the facility (receipt). The figure below depicts a draft design for the new landing page. There will be tabs for each of the main warehouse functions: receipts, put aways, picks and shipments. Each tab will display a list of the items that need or will need attention.

Receipts (12)		Put Aways (10)	Picks (8)	Shipments (4)
Type	All...	Status	All...	Find in Results...
Number	Requested From		Date Requested	Status
00010	Facility 769		09/07/1966	Open

Figure 1. New Landing Page Design

- The **Receipts** tab will display all open purchase orders and requests for products. There will be a hyperlink for each line item, which will navigate to either the Add Receipt (PO) or Add Receipt (Request) page.
- The **Put Aways** tab will display all put away lists that have not been put away and/or verified. Users will be able to navigate directly to the Edit Put Away page for a chosen list. There will also be a quick link for verifying put away lists.
- The **Picks** tab will include both open Pick Lists and open Pick Requests. Each item will have a hyperlink to the Edit Pick List or Edit Request page. A quick link for verification will also be available.
- The **Shipments** tab will display all shipments that are not completed. The shipment number shown will be an active hyperlink to the Edit Shipment page.

Each tab will have filters applicable to the process type as well as a search box. The total number of open items will be listed in the tab header, for example there are four incomplete shipments in the above example. The landing page updates are being provided as a way to expedite processing during normal operations.

Frequently asked questions

Since the last issue of the Insider, we've compiled a few frequently asked questions that we've received via the CTS Help mailbox.

- Previously I completed SAMS identity proofing and received confirmation from SAMS. However, when I try to access the application through SAMS, I receive the following message: *"User is not authorized in IMATS. Please contact an administrator"*. Help!
 - In addition to being approved for CDC Secure Access Management Services (SAMS) access (i.e., completing identity proofing), you will need to be added as a user in both the IMATS and IMATS Training applications. In order to be added as a user, contact an IMATS facility administrator for your organization or an IMATS public health administrator at the state level to be added to both systems and assigned your appropriate role and permissions.
- I'd like all my data in IMATS to be transferred to IMATS Training. Is there an easy way to do that?
 - IMATS has a new export feature that allows users with administrative privileges to export items from IMATS to a tab-separated values file. Exporting is a convenient way to transfer data between IMATS and IMATS Training. Instead of manually typing data into IMATS, you can export the data to a file and then import it using the IMATS Import feature. To export items, use the menu to navigate from **Setup** to **Export** and enter in the required information.
- Is there a way to report inventory counts to CDC if my jurisdiction doesn't use IMATS?
 - During an event, project areas that do not plan to use IMATS as their primary inventory tracking system will send inventory data to CDC via the Inventory Data Exchange (IDE) mechanism detailed in the [IDE specification document](#). Through this process, project areas will receive request messages from CDC and send report messages back to CDC. An electronic copy of the current version of the IDE specification document and the [IDE participation form](#) is available for download on the [IMATS web page](#) under "Supporting Information".

The IMATS web page has moved!

The CTS IMATS web page has moved to a new URL: <http://www.cdc.gov/cts/imats>. Check out our web page for more information on IMATS including training and inventory data exchange documentation, and frequently asked questions.

For more information on any of the CTS programs, contact ctshelp@cdc.gov.

Evaluate IMATS

If your state, region, and/or locality is interested in conducting an evaluation of IMATS for potential adoption, please contact the CTS team. This evaluation will provide you with an opportunity to review all the inventory management features available in IMATS. Below are steps to help you get started:

1. Choose up to five individuals that will participate in the evaluation and send an email to ctshelp@cdc.gov with their names and email addresses.
 - The CTS team recommends you include technical and/or logistical experts and other key decision makers who are able to provide considerable input into determining if IMATS is a good fit for your jurisdiction.
2. The CTS team will provide you with access to the evaluation system for your 30-day trial (depending on usage, longer evaluation periods may be requested).
 - Secure Access Management Services (SAMS) authentication is not required for evaluation of IMATS.
3. Once you have completed the evaluation period and decide to move forward with system adoption, send an email request to ctshelp@cdc.gov.
 - The SAMS authentication process for access to IMATS will then begin.

For those of you who had the opportunity to evaluate IMATS for use in your state or local jurisdictions, thank you!

Did You Know?

IMATS provides the functionality to add a request to the system, which is used to order items from another IMATS facility. To add a request in IMATS, go to **Inventory Management > Requests > Add Request**. IMATS will guide you through the process of entering the request information, shipment information, and addition of items to the product request.

A similar process, **Add Purchase Order**, is used when ordering items from a supplier outside of the IMATS system. To add a purchase order, navigate to **Inventory Management > Purchase Order > Add Purchase Order**.

More details on the Add Request feature are found in the IMATS online help which is accessible by selecting the “?” icon at the top right corner on the IMATS screen. Email ctshelp@cdc.gov for additional information.

Inventory Management Resources

- [SNS Website](#): CDC’s Strategic National Stockpile website
- [IMATS Web Page](#): Countermeasure Tracking Systems IMATS site

Upcoming Conferences

- [ASTHO 2015 Annual Meeting and Policy Summit](#)
 - September 29-October 1, 2015
 - Salt Lake City, Utah
- [NACCHO Annual 2015](#)
 - July 7-9, 2015
 - Kansas City, MO

If you have any questions about the information in this newsletter, please contact ctshelp@cdc.gov.



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